

JULY 2005

JULY 2005													
GENERAL PR EFFORTS								SPECIAL EVENTS PR EFFORTS					
	Media Support	Media Research Fam	Media Develop. Mission	Special Project	Special Interest Project	PR Rep. Present	PR Report	Advance/ Wrap Release	Press Kit/ Packet	Publicity Photos	Photos and/or Video	Spot Coverage/ Results	District/ Umbrella
TDC Regular Meeting						.	.						
DAC Regular Meetings						.	.						
DOMESTIC													
Aquatic Adventures (Soft Adventure) Press Trip		.				.							ALL
INTERNATIONAL													
Fantasy Fest Press Release								.					I
EVENTS													
Coral Spawn								.			.		ALL
Great American Fish Count								.					ALL
Underwater Music Festival								.			.	.	II/C
July 4 Firework Round up								.			.	.	ALL
Alocha Discovery 20 th Anniversary Celebration				I/C
Barley Bay Festival								.					III/IV/V
Hemingway Days Festival								I/C
Drambuie Key West Marlin Tournament								.		.		.	I/F
Holiday Isle Dolphin Tournament								.				.	IV/F
Geiger Key Dolphin Tournament								.				.	II/F
Permit All Tackle Tournament								.				.	I/F
Key West Summer Food & Wine Festival								.		.			I

K-25

Special Events Listed Will Require PR funding from event or district

C= Cultural Umbrella, D= Dive Umbrella, F= Fishing Umbrella

AUGUST 2005													
GENERAL PR EFFORTS								SPECIAL EVENTS PR EFFORTS					
	Media Support	Media Research Fam	Media Develop. Mission	Special Project	Special Interest Project	PR Rep. Present	PR Report	Advance / Wrap Release	Press Kit/ Packet	Publicity Photos	Photos and/or Video	Spot Coverage/ Results	District/ Umbrella
TDC Regular Meeting						.	.						
DAC Regular Meetings						.	.						
DOMESTIC													
Animal Rescuers of the Florida Keys Press Trip		.				.							ALL
INTERNATIONAL													
Oktoberfest Press Release								.					
EVENTS													
Key West Summer Food & Wine Festival (cont'd.)								.					I
Mercury Little Palm Island Grand Slam								.				.	I/F

K-26

Special Events Listed Will Require PR funding from event or district

C= Cultural Umbrella, D= Dive Umbrella, F= Fishing Umbrella

SEPTEMBER 2005													
GENERAL PR EFFORTS								SPECIAL EVENTS PR EFFORTS					
	Media Support	Media Research Fam	Media Develop. Mission	Special Project	Special Interest Project	PR Rep. Present	PR Report	Advance/ Wrap Release	Press Kit/ Packet	Publicity Photos	Photos and/or Video	Spot Coverage/ Results	District/ Umbrella
TDC Regular Meeting						.	.						
DAC Regular Meetings						.	.						
DOMESTIC													
Florida Keys Musical Medley Press Release								.					ALL-C
INTERNATIONAL													
Winter Sun Round-up Press Release								.		.			I
Scandinavian Group Press Trip		.				.							ALL
EVENTS													
WomenFest								.					I/C
Mercury S.L.A.M. Celebrity Tournament								.				.	I/F
Marathon Int'l Bonefish Tournament								.				.	III/F
Islamorada Fall Fly Bonefish Tournament								.				.	IV/F
Women's World Invitational Fly Championship Bonefish Series								.				.	IV/F

K-27

L. Florida Keys and Key West Film Commission

Purpose

The purpose of the Keys Film Commission is to bring awareness of our location to the film, television, video and print industry. Additionally the Film Commission provides assistance and support to productions shooting in the Keys. The film commission may also provide necessary information, props or signage to assist a production company in creating a story that references Monroe County.

Objectives

1. Through marketing, bring a greater awareness of Florida Keys locations to the production industry.
2. To provide assistance when production companies are on location in the Keys.
3. Provide historical information, story ideas, events, flora and fauna, attractions and lifestyles to scriptwriters.
4. Provide local production job opportunities.

Goals

1. Increase location photos on the [www. filmkeys.com](http://www.filmkeys.com). website.
2. Increase marketing efforts in the international film production industry..
3. Increase the e-marketing program.
4. Develop incentive program for the film industry.

Implementation

Film Florida

Film Florida is an organization that was founded to promote Florida as a film destination. Made up of State film commissioners, labor unions, individuals and businesses catering to the film, television and print industry. Our Film Liaison, served on the Film Commissioners Council and sat as a voting member on the Film Florida Board in 2003 -2004. Our presence will continue with Film Florida in 2004 -2005. Our film office in conjunction with Film Florida will organize a New York marketing mission plus one other marketing reception during the upcoming fiscal year.

Website

The Florida Keys & Key West Film Office will be making improvements to its current website, www.filmkeys.com. We have taken comments and suggestions from film industry location managers and production executives in order to create a site that is geared toward their needs. The site will be more user friendly with a broader range of information available to assist production personnel.

Additional location photos will be added to Production Point, a locations website geared to domestic as well as international clientele.

We will also have a presence on the Kemps website. Kemps is an internationally distributed handbook of production services for the film, television and commercial industry. They have recently created a website for queries to film commissions and services advertising in their book.

Location Photo Library

The regular paste up photos along with the digital library will always continue to expand. Industry guidelines require certain standards be used for location files that we follow and continue to produce for our library. A data base program driven application created by floridakeys.com & keywest.com has added extra potential to the library site.

Marketing Campaign

The film office will increase its presence in the international markets. Although locations are somewhat cyclical in favorability, money is what speaks loudest to producer. With US currency on a down turn, it is more cost effective for international companies to come to the US. We will have a presence at international trade shows, a direct mail program and ad campaign to the international client.

New Marketing Tools

Effective July 1, 2004, 2.45 million dollars will be available for Florida's Film Incentive plan in the Governor's Office of Film and Entertainment. Although, the State of Florida does not have the largest incentive program in the world or even in the U. S., it is a beginning. We are hopeful that once proven its worth, we will have greater funds in years to come.

By developing an incentive program in The Florida Keys & Key West we hope to create a more cost effective environment for producers. The first areas to look at will be production rates at lodging facilities. This is the area we have the most difficulty in competing because our room rates tend to be higher than other locations in Florida and the Caribbean. We will also look at restaurant participation in the program and parking permits for production companies.

Industry Trade Shows

Trade shows are venues where the Film Commission office has an opportunity to promote what is available in our destination directly to production companies. Attendance at the following trade shows is proposed for fiscal year 2004 - 2005.

1. Location Expo is scheduled for Los Angeles in February, attendees include location managers, location scouts, writers, producers, and directors.
2. Film Florida Conference is scheduled each May. This is an annual meeting and seminars where industry professionals are invited speakers. This is usually a three-day conference.
3. New York Mission - We plan another New York Mission this year scheduled for the autumn. The Florida Keys Film Office will coordinate the reception for independent film makers in the East Village, New York. Attendees are to include producers, directors and executives from the film and television industry.
4. Los Angeles Mission - The film office plans to partner with the Governor's Office of Film & Television to coordinate a reception for Los Angeles film makers who came from Florida or attended Florida Universities. It will be a way to keep Florida on the minds of film makers and also find out from them what they require in order to make films here.
5. Film Festivals and Sales Missions - Regional film offices are considering opportunities to partner with the State Film Office and production and distribution companies to bring awareness of Florida as a film destination. Targeted attendees are producers, directors and executives in the film and advertising industries.

Location Scouts

Once a production company has been supplied with location photos, video and requested information, the production company may send a location scout or location manager out to take photographs of the areas the company is interested in. On these occasions the Film Liaison meets with and/or escorts the location scout to the possible shoot sites in Monroe County. At times this effort requires the hiring of a helicopter and driving out of county to pick up or drop off the scout from Miami International Airport.

Once the location scout provides the production company with his/her photographs a second and possible third scout may evolve consisting of the producer, director, art director and location manager. Again, the Film Liaison provides escort and possibly transportation for the scout. Efforts made by the film office and local businesses during these scouts may strongly effect the outcome of a location decision.

Location Shoots

When a film, television or still shoot client decides to shoot on location in the Florida Keys, the Film Commission office provides continued assistance dependent upon the need of the company. This assistance may include assistance with permitting, facilitation of discussions and meetings with government officials, law officers, owners or managers of businesses and properties. This office then assists in locating crew to work on the project, establishing contacts for specific equipment or props, hotel room and restaurant possibilities and a myriad of requests that are unforeseen.

The Film Commissioner office also provides information and assistance to the hotel/motels, crew and property owners in the Keys if they have questions or concerns regarding the shoot. Information is provided as to what to expect and what to ask for from a production using their property.

The Film Liaison intends to facilitate a successful experience for both the production company, local crew and businesses.

Public Relations Opportunities

The Film Liaison will continue to work with Stuart Newman Associates and industry publications and publicists for production companies to identify PR opportunities in print and broadcast media for the Florida Keys & Key West.

Measurability

A 'Heads in Beds' report will continue to be submitted as part of the TDC meetings report. This accounts for productions who have utilized the film commission and/or shoot on public property and stay in the Florida Keys.

A year end economic impact report based on numbers from the production companies is to be submitted to the TDC. This includes revenue generated in county, room nights booked, production days and locals hired

A break down of which production companies have utilized the Florida Keys as a location is submitted as part of the TDC reports.

Budget FY 2005

Film Industry Trade Shows

Film Florida quarterly meetings

New York Mission

Locations Expo

Film Florida Conference

Marketing Missions

Registration and Show Expenses \$6,000

Travel Expenses

Air Fare, Hotels, Meals, In-county mileage \$7,900

Dues and Fees

Association of Film Commissioners International \$700

Film Florida \$1,500

Communications

postage, phone, FAX, cell phone, pager, e-mail,
800 incoming calls \$6,500

Support materials

film and processing, office supplies, promotional materials \$7,500

vehicle rentals - boat/helicopter and auto rental for

location scouts and escorting location shoots

Trade publication subscriptions \$400

Production of industry support material

Florida Keys & Key West Production Guide, Production Guide

mailing expenses, WEB site maintenance, database and

mailing support, postcards \$13,000

Support equipment

computer programs, etc. \$4,600

E & P for Production Executives \$3,000

Student intern/location photographer \$6,000

Advertising \$8,500

Resources \$9,400

Total \$75,000

M. Market Research

PURPOSE:

The most successful marketing strategies are those developed through a systematic process fueled by research. Market Research is the use of scientific methods to identify and define marketing opportunities and challenges; generate, refine, and evaluate marketing actions; monitor marketing performance; and improve our understanding of marketing as a process. Market Research needs to be carried out regularly because of the constantly changing environment in which we operate, due to shifts in consumer tastes, technological advances, and changes in economic conditions.

The TDC Market Research department designs and conducts research initiatives focused on tourism in the Florida Keys, which are then interpreted and presented within the context of wider industry trends. Ongoing projects are designed to monitor and reveal shifts in demographics, psychographics, and consumer behavior/motivation among both potential visitors and actual visitors to the Florida Keys & Key West. The purpose of the TDC's Market Research department is to maximize the quality, value, effectiveness and application of research in the development of marketing strategies and in measuring the extent to which marketing goals have been met.

OBJECTIVES:

The objectives of the Market Research program are:

1. To identify accurate, ready, cost-efficient sources of information regarding travel and tourism trends, consumer motivation, and economic indicators in order to advance the development of successful marketing strategies.
2. To continuously gather and track information in order to inform the development and execution of the marketing plan and any ad-hoc shifts in marketing strategy (e.g. September 11th, War in Iraq, etc.).
3. To conduct ongoing primary data collection studies of visitors to the Florida Keys & Key West, as well as potential visitors, including web site visitors and 800-number callers.
4. To evaluate and measure the attainment of overall marketing goals and strategic objectives.
5. To coordinate with other departments, the agencies, and the public and private sectors in the provision and use of applied, actionable research to inform the decisionmaking process and measure effectiveness.
6. To further the understanding and utilization of emerging technologies in the field of market research and strategic marketing.

GOALS:

The goals of the Market Research program are:

1. To develop a program to integrate economic trend data and forecasting into market research practices.
2. To create a replicable process for evaluating web site usability and advertising effectiveness.
3. To develop a Florida Keys-centered focus group research project in major feeder markets.
4. To increase the scope and methods of data collection in tracking the effectiveness of advertising, sales, public relations, film, and visitor information services.
5. To develop a study of traveler motivation and views on "the Florida Keys experience".
6. To develop market segmentation studies of visitors to the Florida Keys based on interests including soft adventure, cultural, weddings, and family travel.

RESEARCH METHODS:

Every research study begins with the identification and formulation of a research question. Once this has been established, the potential sources of information available to answer the question are identified. A research design is then developed. Research designs may be either quantitative or qualitative in nature. Elements of both designs may also be used together in mixed-methods studies to provide more information than could be obtained from using either one alone.

Quantitative Analysis:

Quantitative research focuses on numbers, logic, and the objective, providing quantifiable responses to a specific question obtained from a statistical sampling of a target population. While quantitative data collection techniques can vary depending on the sampling design and the type of information to be collected, the traditional empirical quantitative technique in market research is the survey questionnaire. By administering a survey to a random sample of a population, one is able to draw inferences about the behavior of an entire population.

Survey instruments can include a record sheet for observations, a self-completion questionnaire, or a questionnaire administered by an interviewer. The medium by which the survey is implemented can include mail, telephone, face-to-face interviews, e-mail and the web.

Following the collection of data through the survey instrument, the data are coded and entered into a data file for tabulation and analysis. Resulting summary tables and graphs are the basis for the final report, which outlines the methodology, details the answer to the research question(s), and prescribes conclusions and recommendations.

Qualitative Analysis:

Qualitative research deals in words, images, and tends to be more exploratory and less structured than quantitative research. Qualitative research includes focus groups, in-depth interviews, and observational techniques such as the mystery shopper. While the results of focus groups reflect only a very small segment of the target market, their results offer a far more in-depth understanding of the target's perspectives or opinions than is otherwise obtainable through surveys. With qualitative research, the intent is to provide an understanding of perceptions, feelings, attitudes and motivations.

Market segmentation, the process of breaking the total travel market into smaller, more uniform groups, is one of the basic principles of tourism development and marketing. It recognizes that both business and pleasure travel markets have separate segments, each with a unique set of needs and preferences. By defining markets into segments one can better understand whom, when, how, and why people travel to the Florida Keys & Key West.

In order to be successful in reaching these target markets, we must not only focus on the needs and preferences for each group, but also what motivates these individuals to engage in travel in the first place. The key to understanding travelers' motivations is to see travel as a satisfier of need and wants. Once we understand our visitors needs and wants we will be better prepared to satisfy them.

IMPLEMENTATION:

Research focusing on potential visitors (inquirers) to the Florida Keys & Key West.

Telephone inquiries will continue to be tracked through the VIS software, with monthly reports summarizing the origin of the inquirer (state, country, top cities and states), the advertising source (magazines, newspapers, TV, Internet, etc.), as well as interests, month of arrival, mode of transportation, length of stay, and number in party. Reports will continue to be produced for each District and the County overall. The software and report functions will be maintained and upgraded as needed. Call count reports will enable tracking of monthly and annual variations in VIS call volume to aid operational management. We will track and report data derived from web-based forms (such as requests for brochures or CD-roms) and surveys. We will continue to report on the wealth of data gleaned from the Key West Business Guild's Gay and Lesbian VIS database. We will establish a method of obtaining feedback on usability, conversion, and appeal of our web site and monitor advertising effectiveness. We will also develop our very own Florida Keys-centered focus group research project in select feeder markets.

Research focusing on actual visitors to the Florida Keys & Key West.

Intercept interviews with visitors to the Florida Keys & Key West continue to be the cornerstone of our research efforts with respect to actual visitors. The Visitor Profile Survey will continue to gather demographic, expenditure, activity, satisfaction, and trip planning data from visitors to the Keys. 'Special topic' questions will be added on an as-needed basis. We will continue to track prior cruise ship visitation in District 1 in order to measure potential for conversion into overnight

visits. The data collection will continue to be conducted by an outside research firm, with the data analysis and reporting performed in-house. We will further develop market segmentation studies of both actual and potential Florida Keys visitors based on interests including soft adventure, cultural, weddings, and family travel.

Program effectiveness research initiatives planned for the upcoming year include the annual 'Sales' survey of Florida Keys properties, which gathers detailed information regarding the composition of their business in order to inform the marketing plan and evaluate the efficacy of our sales efforts. After completing an extensive revision of the sales survey instrument, we also developed a separate, specialized survey for those properties which have the capacity to host meetings business in order to evaluate that segment of their business. In addition, regular monitoring of VIS program performance in the form of 'Mystery Shopper' calls will be conducted on the Chambers of Commerce and the Key West Business Guild to evaluate the quality of services being provided to our 800-number callers.

Smith Travel Research data will continue to be utilized on an ongoing basis in order to gauge lodging industry performance. This includes the following: a monthly occupancy and average daily rate report for Monroe County, Key West, and Monroe County excluding Key West overall and by price tier; and weekly reports from properties which provide data on a weekly basis. These weekly reports not only provide a useful means by which to assess the impact of special events and lodging performance over holiday periods but also provide us with quick turnaround of lodging data than we currently see under the monthly schedule. We will maintain our efforts to increase sample size so that further segmentation of the data can be implemented.

Our research partnership with VISIT FLORIDA will continue, as this cooperative relationship has been essential to keeping our research on the cutting edge. This partnership not only enables us to obtain timely data pertaining to consumer travel intentions, forecasting, and regional industry performance but also provides an opportunity to participate in research initiatives we would not otherwise be able to afford on our own. An upcoming study planned for this year seeks to define what visitors perceive as 'the Florida Experience' and we will use this as the basis to take a more Florida Keys-centered look at traveler motivation and their views on 'the Florida Keys experience'. We will continue to strengthen the presence of the market research department by attending and presenting at local industry events such as Hospitality Sales and Marketing Association International (HSMAI) and the Florida Keys Lodging Association functions. With feedback from local stakeholder groups, we will make every effort to design creative, user-friendly data collection methodologies with the aim of increasing sample size and industry participation.

Various other resources such as travel industry and market research journals, newsletters, and web sites will be regularly monitored to assist with anticipating tourism trends. Forecast data will be reviewed for economic and travel behavior information that can be applied to the data we collect at the local level. The department will compile its regular 'Economic Indicators Report', which provides a summary of economic and travel industry trends at the national, state, and local levels. We also plan to further integrate economic trend data into the market research initiatives which emerge from this office.

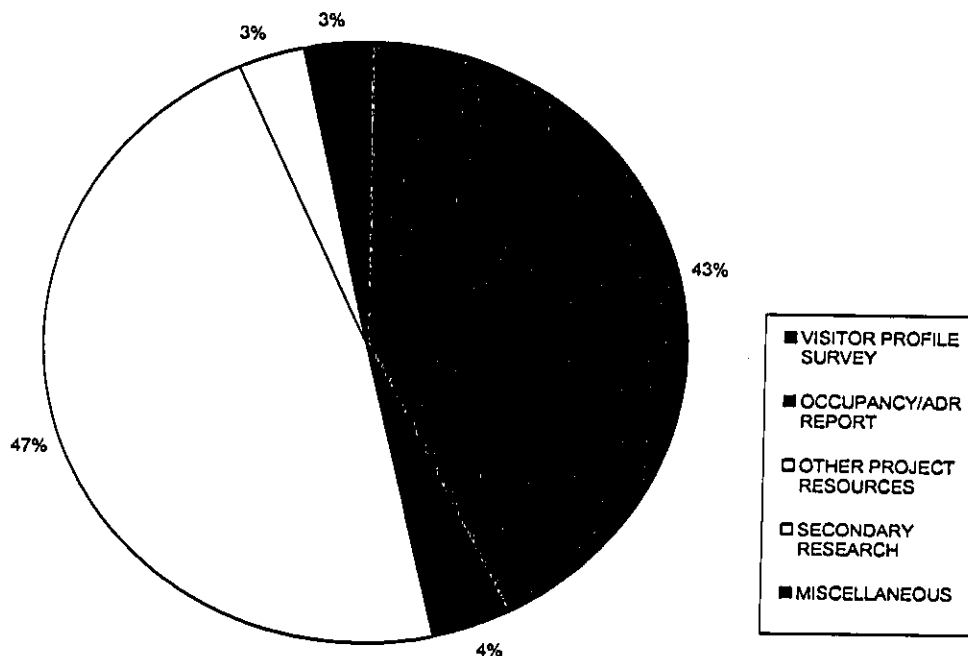
MEASURABILITY:

The above outlined Market Research projects will include stated objectives, outlined in the form of a research question, the information expected to be obtained by the project, and the budget, if any, for the study. Each project will be evaluated after completion to determine if the stated objectives were met, and to assess the value of the information collected.

Additionally, the Market Research department will provide the means for evaluating the goals and objectives of other departments and the agencies.

MARKET RESEARCH BUDGET

VISITOR PROFILE SURVEY	\$68,100
OCCUPANCY & AVERAGE DAILY RATE REPORT	\$6,000
PROJECT RESOURCES	\$75,200
Web Site Usability Study	
Advertising Effectiveness Study	
Market Segmentation Studies	
Focus Group Research	
Sales Effectiveness Research	
Traveler Motivation Research	
Mystery Shopper Surveys	
Other Project Resources	
SECONDARY RESEARCH	\$5,200
Purchase of Secondary Research from Outside Sources	
MISCELLANEOUS	\$5,500
Memberships	
Telephone, Fax, Modem	
Postage	
Computer Equipment/ Software Upgrades	
Conference, Workshop, Seminar Attendance	
Data Entry Assistance	
TOTAL	\$160,000



Section Four: Evaluation

The final area of a marketing plan consists of assessing the effectiveness of the programs. The TDC must continuously monitor its marketing plan to ensure that it is accomplishing what it was intended to do. Goals should be established to serve as benchmarks for assessing the plan's effectiveness.

Based on a regular evaluation of these benchmarks, adjustments are inevitable in order to redirect marketing efforts towards the highest level of performance.

Though TDC's have different ways of tracking their marketing and sales efforts, there are several common measurement factors used in assessing the level of a program's performance. The TDC Market Research Department regularly conducts visitor inquiry analysis and monitors advertising media effectiveness. Research strategies also utilize lodging data and visitor profile data.

The increasingly competitive nature of the marketplace necessitates a private sector model of continuous improvement and innovation largely spurred by improved technology. Utilizing the technology of the day ensures the quality of advertising, sales, public relations and overall marketing performance for tomorrow.

In the marketing strategies, methods and implementation sections of the marketing plan, each area (advertising, sales, public relations, film commission) includes specialized evaluation criteria to measure performance. Accountability assessment is the sound measurement of the extent to which stated goals of a specific marketing effort are being or will be achieved.

Accountability assessment not only measures performance, but also enables review of the adequacy of our goals and provides us with guidance as to how future marketing performance can be maximized. Having the ability to make quick adjustments in our marketing is also an important element of our program. Being able to gather and analyze data in a timely manner gives us the ability to make changes in plan.

In summary, we are making every attempt to develop an orderly planning process which includes a clear statement of goals to be attained in the time frame outlined. Those goals are reached through a series of marketing strategies and methods, each of which can and should be measured. The measurement techniques should be designed objectively, without preconceived notions of the results and without a design which attempts to prove something works. Such methods include:

- Pre-post tracking studies, which measure users and non-users of our marketing efforts. Why someone did not respond is as important as why some did.
- More comprehensive studies of how travel information is delivered and used and the role of technology in the travel planning process. Focus group studies have continued to show that many travel decisions have very little to do with the excellence of the destination, but rather with the traveler's emotional need to travel and their image or perception of the destination.
- The measures of economic impact and return on investment (ROI). What are the total benefits of a visitor coming to our area versus the cost of attaining those benefits?
- Qualitative analysis to learn what works in marketing our area, both in the short and long term. Our assessment of this year's plan should not only grade our current efforts but should help show us how to make them more effective in subsequent years.

Some of the criteria or techniques that will be used or planned by the TDC this year to assess program effectiveness include:

- VIS reports
- VIS mystery shopper reports
- Occupancy and average daily rate reports
- Competitive data from other destinations
- Focus group studies
- Conversion studies
- Economic & tourism indicators
- Visitor Profile Survey reports
- AT&T reports
- bed tax revenues
- sales tax revenues
- US 1 travel counts
- airport arrivals and cruiseship passenger counts
- ground transportation(Greyhound, shuttles) reports
- reader response cards
- Internet request reports
- Internet advertising click-through counts
- Web site visits
- Web site brochure and video downloads
- electronic lead tracking
- state and national campground reports
- travel agent reports
- receptive operator reports
- meeting business booked by TDC staff leads
- number of meetings booked
- follow-up sales leads reports
- credit card demographics
- European agencies' reports

Since employee performance is key to the achievement of the objectives and goals of the TDC, staff evaluation is an important part of the assessment system. We have developed a performance assessment to achieve this purpose which requires the following:

1. Inform the employee about the skills needed and responsibilities required for the position.
2. Identify the standard of work.
3. Point out the areas of improvement
4. Give formal performance evaluation with objective criteria to measure

We will continue to evaluate the Visitor Information Services program with the chambers of commerce and the Key West Business Guild. We need to make sure that the VIS operators remain well-informed, enthusiastic ambassadors and hospitable hosts. We will monitor accuracy and timelines for fulfillment and the number of calls and mail pieces sent.